

A guide to Report Designer in Horizon.

Horizon 3.299

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# 1. Introduction

Over the next couple of pages this will display how to use the functionality of the Marketing Module.



# 2. Manual Campaign

Note: As creator of the campaign you will be the only user able to edit/delete the campaign.

### 2.1 Creating a new campaign

#### 1. Select the Add button.

You'll then be presented with a new marketing campaign window.

Campaig	n Details		
Campaign N	ame New Campaign		
Details Ima	age   Email		
Trader Selecti	ion Product Selection	Sp Amount	Bought Include
Trader Selecti		Sp Amount	Bought Include
Trader Selecti	ion Product Selection	Sp Amount	Bought Include
Criteria	<no data="" display="" to=""></no>		Bought Include
	<no data="" display="" to="">  Traders  Ne data to display&gt;  Ne data to display&gt;</no>		Bought Include
Sub Criteria	<no data="" display="" to=""></no>	w Edit	Bought Include
Sub Criteria Products	<no data="" display="" to="">  Traders  New Edit</no>	w Edit	Bought Includ
Sub Criteria Products Spend	<no data="" display="" to=""></no>	w Edit	Bought Include
Sub Criteria Products	<no data="" display="" to="">  Traders  New Edit</no>	w Edit	Bought Include

#### 2. Fill in the Campaign Name

This is normally something relating to what the campaign is for so you are able to identify it easily.

- 3. Fill in the selection criteria for your campaign.
  - Select your trader selection
     You then have the ability to select if you wish to Include or Exclude traders from your campaign.
  - b. Select your sub-criteria This can beet to one of the following options:
    - None Enables you to just use the trader selection criteria.
    - Product Enables you to use selected criteria on which looks at what products traders have bought or have not bought.
    - Branch Spend Enables you to bring back traders looking at individual branch spend, which have spent 'less than' or 'more than' a specified amount.

- Product Plus Branch Spend Enables you to do a combined sub criteria search on product and branch spend.
- Account Spend Enables you to bring back trader looking at the full account spend, which has spend 'less than' or more than a specified amount'.
- Product Plus Account Spend Enables you to do a combined sub criteria search based on product and account spend.

*Note: Depending on which option you've selected, you will be presented additional selection criteria for product and spend.* 

- c. Finally you need to fill in your date range selection. Note: If you don't require to use a date range criteria and want to use all dates, make sure the 'All Dates' tick box is set, otherwise un tick this option.
- 4. If you are going to email your campaign, you will need to do the following.
  - a. You are required to set an image against the 'Image' tab.
  - You are required to setup your email message on the email tab which will be emailed to your customers. An html editor is provided in this section, however this is quite basic.
     Note: If you require something more advanced to design your marketing email we would advise using a piece of web design software.
- 5. Once you've set up your details for your campaign to then save the criteria, you just need to make sure that you've selected 'Confirm' to make it greyed out, and then select 'Close'.

#### 2.2 Modifying an existing campaign

If you later wish to modify any of the details in your marketing campaign, all you need to do is highlight your campaign in the list and then select the **Edit** button.

Once you've modified your details for your campaign to then save the criteria, you just need to make sure that you've selected 'Confirm' to make it greyed out, and then select 'Close'.

#### 2.3 Deleting an existing campaign

If you later wish to delete your marketing campaign, all you need to do is highlight your campaign in the list and then select the **Delete** button.





### 3. Fast Campaign

Note: As creator of the campaign you will be the only user able to edit/delete the campaign.

### 3.1 Setting up your Campaign Template

You need to create a HTML email body template to use this function. This is stored in the live directory within the folders Marketing > Templates. (as seen below)

			. Tanlah	(C		x
Organize •	« OS (C:) + Horizon + Include in library •	Share with -	New folder	Search Templates	FII	م 0
🖉 OS (C:)		Î	Email_Marketing.html			
1	item State: 潴 Shared					

Within the template you can use the following flag options:

- %line\_start% Is the Starting point of the list
- %line\_end% Is the end point of the list
- %expiry% Is replaced by the Expiry Date in the Sales Entry
- %code% Is replaced by the Product Code
- %description% Is replaced by the Product Description
- %price% Is replaced by the Price
- %pack% Is replaced by the Pack Size
- %buynow% Is replaced by a link to the product on HorizonWeb.

You are also able to use the standard options within Marketing:

- %name% Customer Name
- %address% Customer Address
- %date% Current Date
- %pic% Trigger Picture
- %contactname% Contact Name
- %unsubscribe% Unsubscribe Link
- %salutation% Customer Salutation
- @login@ HorizonWeb Login link
- @autologin@ HorizonWeb Automatic Login link



An example on how to implement these options is to create an html table to use these options (as seen below).



Note: A copy of this file can be obtained from ECi Bluesky Support.

	BlueSky		pport@blues	kysoft.co.uk
Code	Description	Pack	Sale Price	Order
Metallic Blu	e			
003R06711	VS Xerox Premium 95gsm 610mm X 45m	1	15.11	Buy now
172774	HP 364 Inkjet Cart Black CB316EE	1	5.20	Buy now
122936	HP 364 Inkjet Cart Cyan CB318EE	1	4.80	Buy now
322944	HP 364 Inkjet Cart Magenta CB319EE	1	4.80	Buy now
322952	HP 364 Inkjet Cart Yellow CB320EE	1	4.80	Buy now
713923	HP Univrsi Bond Paper 610mmx45.7m Q1396A	1	8.90	Buy now
nfidential o	nessage is intended solely for the person to w or privileged information. If you have received <u>eskyrofic.co.uk</u> and destroy this e-mail and any y, distribute or take any action in reliance on t	it in error, pleas attachments. I	e notify n addition, you i	

When the marketing email body campaign is ran it would look like this:



### 3.2 Creating a Fast Campaign

1. Go into Sales > Sales Contract

#### 2. Create a Sales Contract

*Note: Create onto your All Deal / Group Deal trader depending on who you wish to get the campaign.* 

3. Add the codes and modify the prices to what you wish to be displayed in your marketing campaign.

#### 4. Select the Campaign button.

You'll then be presented with the campaign preview screen:

🔛 Create Campaign	
Select Marketing Template	
Campaign X Dore	

5. Select the Marketing Template.

You'll then be presented with a preview of the Campaign:

😓 Create Campaign					
Select Marketing Template	EC	Blue <b>Sky</b>	email: s		01283 731 460 eskysoft.co.uk
	Code	Description	Pack	Sale Price	Order
	Metallic Slue				
	00215X	Tippex Rapid Fluid White 8012969	10	9.34	Buy.now
	295195	5 Star Office Medium Ball Pen Blue	50	3.52	Buy now
	913934	5 Star Office Pencil Pot Black	1	0.90	Buy.now
⊙ Emal_Maketing	confidential or support@blues	While stock exage is intended solely for the person to privileged information. If you have receive <u>kwoft.co.uk</u> and destroy this e-mail and distribute or take any action in reliance of	whom it is addr ed it in error, ple any attachments.	ase notify In addition, yo	u must not
	represent those amendment, v interception, ur	pinions presented in this e-mail are solely of the company. E-mail may be auscept iruses and unforeseen delays, and we do nauthorised amendment, viruses and delu attachments are opened at your own risi	ble to data corru not accept liabilit iys or the conseq	ption, intercept y for any such o	ion, unauthorised data corruption,
Campaign X Choice		If you no longer with to receive emails i	tom us you can <u>una</u>	ubscribe here	



#### 6. Select the **Campaign** button.

You'll then be presented with a new marketing campaign window.

😜 Campaig	Details		
Campaign N	me New Campaign		
Details Ima	ge Email		
Trader Select	on Product Selection	Sp Amount	Bought Include
	<no data="" display="" to=""></no>		
		$\square$	
Criteria	Traders New	Edit	
Sub Criteria			
Products	New Edit		
Spend			
Date Range	All Dates New Edit		
	+ Add X Cancel	✓ Confirm	Close

#### 7. Fill in the Campaign Name

Note: This is normally something relating to what the campaign is for so you are able to identify it easily.

- 8. Fill in the selection **Criteria** for your campaign.
  - Select your Trader selection
     You then have the ability to select if you wish to Include or Exclude traders from your campaign.
  - b. Select your Sub-Criteria This can beet to one of the following options:
    - None Enables you to just use the trader selection criteria.
    - Product Enables you to use selected criteria on which looks at what products traders have bought or have not bought.
    - Branch Spend Enables you to bring back traders looking at individual branch spend, which have spent 'less than' or 'more than' a specified amount.
    - Product Plus Branch Spend Enables you to do a combined sub criteria search on product and branch spend.
    - Account Spend Enables you to bring back trader looking at the full account spend, which has spend 'less than' or more than a specified amount'.
    - Product Plus Account Spend Enables you to do a combined sub criteria search based on product and account spend.

*Note: Depending on which option you've selected, you will be presented additional selection criteria for product and spend.* 



c. Finally you need to fill in your **Date Range** selection.

Note: If you don't require to use a date range criteria and want to use all dates, make sure the 'All Dates' tick box is set, otherwise un tick this option.

- 9. You are required to set an image against the **Image** tab.
- 10. Once you've set up your details for your campaign to then save the criteria, you just need to make sure that you've selected 'Confirm' to make it greyed out, and then select **Close**.

#### 3.2 Modifying an existing campaign

If you later wish to modify any of the details in your marketing campaign, all you need to do is highlight your campaign in the list and then select the **Edit** button.

Once you've modified your details for your campaign to then save the criteria, you just need to make sure that you've selected 'Confirm' to make it greyed out, and then select 'Close'.

#### 3.3 Deleting an existing campaign

If you later wish to delete your marketing campaign, all you need to do is highlight your campaign in the list and then select the **Delete** button.



### 4. Trader Criteria

#### 4.1 Creating a new trader list.

Select the **New** button next to the drop down box for the Trader criteria in your campaign.

🕒 Trade	er Selection				
Primary	Additional				
Code	Name	Rep Contact		Email	
			<no data="" display="" to=""></no>		
Trader	Contact				
🔽 All Us	ers	🔽 All Process Types	🔽 All Busines Types	Trader Groups	
	-	<b>•</b>	▼		
🔽 All Are		All Distribution Types	🔽 All Branches		
	•	•	▼		
Postcode		All Classifications	All Cost Centres		
	· · · · · · · · · · · · · · · · · · ·	•	<b>•</b>		
🔽 Norm	hal	REP	All Catalogues		
🔽 Quer		ner	•		
🔽 On S	top Trad	er Type 🗸 S 🗖 D 🗖 L 👘 P			
Save As					Preview Close

This defaults you to your **Primary** trader selection criteria, this enables you to fill in your criteria for trader selection. This is based on:

- Users Account Manager set against the Trader.
- Areas Area set against the Trader.
- Process Types Process Type set against the Trader.
- Distribution Types Distribution Type set against the Trader.
- Classifications Classification set against the Trader.
- Business Types Business Type set against the Trader.
- Branches Branch of the Company set against the Trader (Used if Multi-Branched)
- Cost Centres Company Cost Centre set against the Trader.
- Catalogues Catalogue that the Trader is distributed against (Catalogue has to be distributed to the Trader for this option to work).
- Post Code Enables you to search for all Traders in a specific Post Code Area (Works with partial and full Post Codes.)
- Rep Enables you to search for all Traders with a specific Rep Code.
- Trader Type Enables you to search for all Sales, Delivery, Lead and Purchase Trader.
- Trader Status Enables you to select Traders that are Normal, Queried or On Stop.
- Trader Groups Enables you to select from the Trader Groups you've setup.

You can preview the trader selection from the details you've entered by pressing the Preview button.



S Trade	er Selection	8					
Primary	Additional			_			
Code	Name	Rep Contact		Email			
			N				
			<no data="" display="" to=""></no>				
Trader	Contact						
🔽 Lim	it to Sales Contact Only				Contact Groups		
	y Contacts with an Email A	ddress					
	y Contacts that Have allow						
🔽 Only	Contacts That have allow	ved Mailshot					
🗖 Only	y Contacts That are Web I	Enabled					
📄 Only	∙ y Contacts That are NOT ·	Web Enabled					
Cours à							
Save As						Preview	Close

You can then define on the **Contacts** tab the contact selection from the traders that you've selected on the **Trader** tab. This is based on:

- Limit to Sales Contact Only If ticked will only show the Contact set as the **Sales Contact** against the trader, otherwise will show all Contacts.
- Only Contacts with Email Address If ticked will only show the Contacts with an email address set against them.
- Only Contacts that have allowed Emails If ticked will only show the Contacts with Allow Email ticked.
- Only Contacts that have allowed Mailshot *If ticked will only show the Contacts with Allow Mailshot ticked.*
- Only Contacts that are Web Enabaled *If ticked will only show the Contacts that have* **Web Enabled** *ticked.*
- Only Contacts that are not Web Enabaled *If ticked will only show the Contacts that do not have* **Web** *Enabled ticked.*

You can preview the contact selection from the details you've entered by pressing the 'Preview' button.

To then save these details, place a reference into the '**Save As'** field, something relating to what the trader selection so you instantly know what the selection is so you know what it is for future use.



#### 4.2 Modifying saved trader search criteria inside a campaign.

When in your marketing campaign and you require to modify the trader selection that you want to use. If you select the trader selection from the drop down box and then select the 'Edit' button, this will bring up the trader criteria screen so you can modify the selection.

#### 4.3 Modifying saved trader search criteria outside a campaign.

When you're in the Marketing screen, you are able to simply modify trader search criteria without entering your campaign.

To do this you simply have to click on the **Saved Criteria** option. This will then bring up a box with all your saved criteria in.

Saved Search Criteria	
Saved Criteria Name	
BlueSky Support	
· · ·	
X Delete A Edit	

To then edit one of your saved criteria, highlight the saved criteria you wish to modify and then select the **Edit** button, this will bring up the trader criteria screen so you can modify the selection.

#### 4.4 Deleting saved trader search criteria.

If you no-longer require a saved criterion in Marketing and wish to delete it so it does come up for selection in a campaign.

In the Marketing screen, select the **Saved Criteria** option. This will then bring up a box with all your saved criteria in.

😔 Saved Search Criteria	
Saved Criteria Name	
BlueSky Support	
X Delete	Edit

To then delete one of your saved criteria, highlight the saved criteria you wish to delete and then select the **Delete** button.



### 5. Product Criteria

#### 5.1 Creating a new product selection criteria.

In the sub criteria when you select an option including **Product**, you will then be presented with an additional field for **Products**. Select the **New** button next to the drop down box for the Products criteria in your campaign.

S Product Selection	and the second second		
Primary Aditional			
Code		Description	
		<no data="" display="" to=""></no>	
V All Catalogues	V All Brands	Groups	
	▼ <b>▼</b>		
V All Ranges	All Manufacturers		
All Groups	•		
Air aroups	•		
All Sub Groups			
	•		
Save As			Preview Close

This defaults you to your **Primary** Product selection criteria, this enables you to fill in your criteria for product selection. This is based on:

- Catalogue Enables you to select which Catalogue you wish to use for your campaign.
- Ranges Enables you to select which Range of products you wish to use for your campaign.
- Groups Enables you to select from the Groups associated to which Range you've selected.
- Sub-Groups Enables you to select from the Sub-Groups associated to which Group you've selected.
- Brands Enables you to pick a specific brand of products.
- Manufacturers Enables you to pick a specific manufacturer of products.
- Groups Enables you to pick products that are in a specific product group.

You can preview the trader selection from the details you've entered by pressing the 'Preview' button.

To then save these details, place a reference into the **Save As** field, something relating to what the product selection criteria so you instantly know what the selection is so you know what it is for future use.



#### 5.2 Modifying saved product selection criteria inside a campaign.

When in your marketing campaign and you require to modify the product selection that you want to use. If you select the product selection from the drop down box and then select the **Edit** button, this will bring up the product criteria screen so you can modify the selection.

#### 5.3 Modifying saved product selection criteria outside a campaign.

When you're in the Marketing screen, you are able to simply modify product selection criteria without entering your campaign.

To do this you simply have to click on the **Saved Criteria** option. This will then bring up a box with all your saved criteria in.

😔 Saved Search Criteria	
Saved Criteria Name	
BlueSky Support	
X Delete	Edit

To then edit one of your saved criteria, highlight the saved criteria you wish to modify and then select the **Edit** button, this will bring up the trader criteria screen so you can modify the selection.

#### 5.4 Deleting product selection criteria.

If you no-longer require a saved criterion in Marketing and wish to delete it so it does come up for selection in a campaign.

In the Marketing screen, select the **Saved Criteria** option. This will then bring up a box with all your saved criteria in.

Saved Search Criteria	
Saved Criteria Name	
BlueSky Support	
X Delete	Edit

To then delete one of your saved criteria, highlight the saved criteria you wish to delete and then select the **Delete** button.



# 6. Date Range Criteria

#### 6.1 Creating a new date range.

Select the **New** button next to the drop down box for the Date Range in your campaign.

🌖 Date Ra	nge				x		
In The Last			Starting Ago				
Days	0	÷	Days	0	÷		
Weeks	0	÷	Weeks	0	÷		
Months	0	<b>*</b>	Months	0	-		
Name							
ОК				Canc	el		

This brings up the date range selection screen.

On this screen there are two sections to your date selection In The Last and Starting Ago.

- In the Last This is your selection for how far back you wish to look at. This works in conjunction with the 'Starting Ago'.
- Starting Ago This is when you want the system to start looking at the data from e.g. If you left as '0' it would look from the current date, however if you set Months to 1, it would look at data from a month ago.

Example:

Note: Written on 20/02/2011

🌍 Date R	ange	
In The	Last	Starting Ago
Days	0 🚔	Days 🛛 🚔
Weeks	0	Weeks 🛛 📮
Months	3 🛟	Months 1 🌻
Name		
		Cancel

With the above date range selection set. It would start looking at data in Horizon a month ago -20/01/2011 and then look back over the system at the data placed in the last 3 months, meaning the ending date for the date range would be 20/11/2010.



#### 6.2 Modifying a saved date range inside a campaign

When in your marketing campaign and you require to modify the date range that you want to use. If you select the date range from the drop down box and then select the **Edit** button, this will bring up the date range screen so you can modify your date range.

#### 6.3 Modifying a saved date range outside a campaign.

When you're in the Marketing screen, you are able to simply modify your date range without entering your campaign.

To do this you simply have to click on the **Saved Criteria** option. This will then bring up a box with all your saved criteria in.

Saved Search Criteria	
Saved Criteria Name	
BlueSky Support	
X Delete	Edit

To then edit one of your saved criteria, highlight the saved criteria you wish to modify and then select the 'Edit' button, this will bring up the trader criteria screen so you can modify the selection.

#### 6.4 Deleting a saved date range.

If you no-longer require a saved criterion in Marketing and wish to delete it so it does come up for selection in a campaign.

In the Marketing screen, select the **Saved Criteria** option. This will then bring up a box with all your saved criteria in.

Saved Search Criteria		
Saved Criteria Name		٦
BlueSky Support		
X Delete	Edit	

To then delete one of your saved criteria, highlight the saved criteria you wish to delete and then select the **Delete** button.



# 7. Marketing Image Details

#### 7.1 What is the Image used for.

The image is used as a trigger, which enables you to know if your customer has read your marketing campaign or not. This can be seen on the main screen of the marketing in the contacts list for the campaign.

#### 7.2 How do I add in an image onto my campaign.

To add an Image onto your campaign:

- 1. Go onto the **Image** tab in your campaign.
- 2. If you then right click on the box and select 'Load'.
- 3. Then browse to your image you wish to be used as your Trigger Image and confirm.
- 4. This will then bring it into the Image box.
- 5. Select the **Confirm** button in your campaign to confirm your image selection.

Note: You can use whatever image you wish as your trigger image, this can be a small 5x5 white pixel image, your company logo, or you're main Image used for your campaign there are no limits.

🏐 Campaig	n Details		
Campaign N	ame New Campaign		
Details Ima	ge Email		
Trader Selecti	on Product Selection	Sp Amount	Bought Include
	<no data="" display="" to=""></no>		
Criteria	Traders     New	Edit	
Sub Criteria			
Products	Vew Edit		
Spend			
Date Range	💌 🖓 All Dates New Edit		
	Add X Cancel	🗸 Confirm	Close



#### 7.3 How to modify your image in your campaign.

To modify the image you've uploaded into your campaign, right click on the image; you will then be presented the options to perform the following tasks:

- Cut
- Сору
- Paste
- Delete
- Load
- Save As

Once you've made any modifications to the image select the confirm button, to save any changes.

### 7.4 How to link the Image into your marketing email.

To link the image into your marketing email, you just need to include the **%pic%** variable into your email. When you process your campaign the **%pic%** variable will automatically swap for your trigger image.



# 8. Marketing Email

### 8.1 Creating your marketing email.

To setup your marketing email you need to go onto the **Email** tab in your campaign.

Note: When designing your marketing email it is best to get all the images ready that you wish to use and store them somewhere easy assessable.

😜 Campaigi	n Details							
Campaign Na	ame New Campaign							
Details Ima	ige Email							
Subject								
Attachment							•••	
							~	Upload Files
							~	Edit
< 							•	
Trader Selecti	ion		Product Selection	on			Sp Amount	Bought Include
			<no data<="" th=""><th>to display&gt;</th><th></th><th></th><th></th><th></th></no>	to display>				
Criteria	•	Traders				New	Edit	
Sub Criteria		•						
Products	•				•	New Edit		
Spend	•							
Date Range			🕶 🖂 All Dates	New Edit				
					Add	🗙 Cancel	V Confirm	Close

Once you have the images and the text ready you can start designing the marketing email. Marketing has a built in HTML editor which will allow you to create flyers and promotional emails. This will allow you to insert images, text with different colours and fonts etc.

Note: If you wish to be more adventurous you can use a more advanced editor which will allow you to put things in like tables and use more fonts. Most editors come with preview modes so you can preview your flyer. It is then very easy to load the HTML created in the editor into Horizon.



To start creating your marketing email, you initially need to place a **Subject**; this will be the first thing the customer see before opening the email.

Now click on the **Edit** button, this will pop up the HTML Editor screen.

😜 HTML Editor							
Black	• I B = = =	T	1	📕 Save To File	📕 Load From File		Save 🖕
						~	Variables
							Customer Name
							Customer Address
							Current Date
							Picture
							Contact name
							Unsubscribe Link
							Customer Salutation
							HorizonWeb Login
							HorizonWeb Auto Logi
						Ŧ	
Upload Files							Close

You should now see the above seen. You can now add your text, and modify the font style, font size, colouring, indentation.

To insert an image all you need to do is right click on a blank area and select the option 'Insert Image'. All you then need to do is browse to the image you wish to use.

Note: All Images used will need to be uploaded onto your HorizonWeb box. You will also have to adjust the path to your image once you have saved your marketing email in the HTML Editor.

Once you are happy with your marketing email layout, click on the 'Save' button to save your work. If you do not select this option and just exit, all work you have done will be lost.

#### 8.2 How to upload Images to your HorizonWeb box.

To upload the images click on the Upload Images button whilst in the HTML editor. Select the image you want to upload and then click upload.

Note: You can select multiple images by holding down the CTRL key.

#### 8.3 Adjusting the path on your Image.

Once you have uploaded the image to the web server you have to make a small adjustment to the html code so that the image is viewable on the web.

For every image you have included in the HTML you need to make an alteration to the link before the image.

For example:

<img src="C:\Users\BlueSky\Desktop\00215X.gif">

As you can see in the above example in this line in your html, the image being referenced to is sat on your desktop. The actual image you want to reference is sat on your HorizonWeb box so you need to edit and change the html to reflect this.

```
<img src="http://xx.xx.xx/Images/00215X.gif">
```

xx.xx.xx is the external ip address of your HorizonWeb box as given to you earlier in this document. The Images folder is where the images(s) are uploaded to on your HorizonWeb box. You need to repeat this process for every image you have uploaded.

#### 8.4 Variables available for your marketing email.

There are a range of variables available that can be used in your marketing email that brings in details of the customer into the email. These are as followed:

- %name% Customer Name
- %address% Customer Address
- %date% Current Date
- %pic% Trigger Picture
- %contactname% Contact Name
- %unsubscribe% Unsubscribe Link
- %salutation% Customer Salutation
- @login@ HorizonWeb Login link
- @autologin@ HorizonWeb Automatic Login link



# 9. Online Campaign

#### 9.1 How do I show my campaign when a customer logs into HorizonWeb?

To setup your campaign so it shows when the customer logs into HorizonWeb, you need to create your campaign as normal.

In the Campaign Name field you need to place a \*. This is then interpreted to display as the logged in message to the customers that meet the campaign criteria.

🌖 Campaig	Details		
Campaign N	me New Campaign		
Details Ima	je Email		
Trader Selecti	on Product Selection	Sp Amount	Bought Include
	<no data="" display="" to=""></no>		
Criteria	▼ Traders	Edit	
Sub Criteria			
Products	New Edit		
Spend			
Date Range	🔻 🗹 All Dates New Edit		
	Add X Cancel	🖌 Confirm	Close

Note: The email message that you've designed on the email tab is displayed as the logged in message on HorizonWeb.



# **10. Processing Campaigns**

### **10.1 Emailing Your Campaign**

Before sending the email to a large group of customers it is important to send it to a small sample to ensure that the links and format of the email look good.

Note: The test email must be sent to someone outside the building and not someone internally as the images may not be recognized when you open the email.

Select the Campaign you wish to process and then select the **Process** button. You will then be presented with the **Campaign Process** screen.

😜 Campaign Proce	255
Action	Calls Default User
<ul> <li>Add Calls</li> <li>Export</li> </ul>	<ul> <li>Use Account Manager Where Present</li> <li>Popup Calls</li> </ul>
O Labels	Labels
Close	Mark As Processed Use Outlook Go

Select the action to **Email**, you are also offered the options of sending straight out via Horizon or using Outlook.

If you wish to send out the marketing email via outlook tick the **Use Outlook** option otherwise the emails will be sent out through Horizon.

Note: Using Outlook has better traceability as a copy of the email is stored in your Outlook Sent folder.

Press Go to process your campaign.

Once the email shot has been processed it will move the campaign into the **Processed** section. Unless you've un-ticked the **Mark As Processed** option on the **Campaign Process** screen.



#### **10.2 Creating Labels From Your Campaign**

Select the Campaign you wish to process and then select the **Process** button. You will then be presented with the **Campaign Process** screen.

🌖 Campaign Proce	255 D
Action O Email	Calls Default User
<ul> <li>Add Calls</li> <li>Export</li> </ul>	<ul> <li>Use Account Manager Where Present</li> <li>Popup Calls</li> </ul>
⊙ Labels	Labels
Close	Mark As Processed Use Outlook Go

Select the action to Labels.

The drop down box will then be activated for you to select the type of labels that you are using so they get printed off in the correct format.

Press Go to process your campaign.

Once the labels have been created it will move the campaign into the **Processed** section. Unless you've unticked the **Mark As Processed** option on the **Campaign Process** screen.



#### **10.3 Exporting the List Of Customers From Your Campaign**

Select the Campaign you wish to process and then select the **Process** button. You will then be presented with the **Campaign Process** screen.

S Campaign Proce	255
Action O Email	Calls Default User
Add Calls     Export     Labels	✓ Use Account Manager Where Present ✓ Popup Calls
Close	Labels Mark As Processed Use Outlook Go

Select the action to Labels.

The drop down box will then be activated for you to select the type of labels that you are using so they get printed off in the correct format.

Press Go to process your campaign.

Once the labels have been created the campaign is moved into the **Processed** section. If you've un-ticked the **Mark as Processed** option on the **Campaign Process** screen the campaign will not be moved into the **Processed** section.



#### **10.4 Creating Automatic Calls for A Campaign**

Select the Campaign you wish to process and then select the **Process** button. You will then be presented with the **Campaign Process** screen.

Action       Calls         Email       Default User System Manager         Add Calls       Use Account Manager Where Present         Export       Popup Calls         Labels       Labels         Close       Mark As Processed	🌔 Campaign Pr	ocess 📃 🗖 💻 🏹
	<ul> <li>Email</li> <li>Add Calls</li> </ul>	Default User System Manager

Select the action to Add Calls.

This will then activate the **Calls** Section.

Select the Default User, to the main contact on the system you wish the Calls to be created for.

If you tick the option for **Use Account Manager Where Present** it will then create the call for the Contact as the Account Manager, if there isn't one set it will create it for the Default User.

Once created these calls will be visible in the Call Manager screen and also on the Trader's Call overlay tab.

#### **10.5 Using Calls to Manage Your Campaign**

Once you have emailed out your marketing campaign you may want to follow this up with a campaign of telesales or you may be just interested in finding out who doesn't buy something and then following up with a telephone campaign.

From Horizon we are able to see who has opened an email. If we know who has opened the email we may want to follow this up with a phone and create some automatic calls via the call manager to aid with the call management.



# 11. Other Details

### **11.1 Setup email settings**

Select the Settings tab in the Setup Company and then 'Email' (as seen below).

Compar	ry Setup 🗖 🔲 🕰
Confirm	Cancel Add Company Delete Company Contacts Load Reports
Code	BLUESKY BlueSky System Solutions
Address	Chatsworth Court 0
	Alpha House
	Uttoxeter Road
Town	Hilton Hide All Transactions READ ONLY
County Post Code	DEE5 5GE
Stock	Detailed Detailed
Branch	
VAT Reg	Currency GBP 👻 Great Britain (Pounds) 💌
Settings E	ank Details Cost Centres Areas Reps Branches Tills Returns Report Audit Logins
General Y	es / No Options Financial Logo Email Default Contacts Invoice Formats Costings Label Analysis
SMTP	These settings define the Parameters needed to connect to your Mail server ,
POP3	
User Name	This will either be direct i.e Mail.Btinternet.com or similar or via an internal mail server like Microsoft
Osel Name	exchange server
Password	If You are unsure copy the information form your
Server requ	res Authentication

In here you are required to set up your email information. This means that all emails from Horizon and HorizonWeb will be able to be sent to your customers.

You are asked for you STMP, POP3, Login and Password to be entered. These will be available from your Internet Service Provider (ISP). If your server requires authentication when sending emails, please tick the tick box provided.



### 11. 2 Setup web address / internal IP address

In Horizon if you go into **Setup** and then select **Web**. This will then pop up the **Web Setup** and display the **Rules** tab.

😜 Web Set	up								<b>D</b> X
Confirm	<b>X</b> Discard	-							
Code	BLUESKY	Blu	eSky System S	olutions					
Address	Chatsworth	Court							0
	Alpha Hous								
	Uttoxeter R	oad							
Town		Hilton							
County Post Code	Derbyshire DE65.5GE								
1 Ost Code	0200002								
Welcome Message Logged In Message Lost Password Message Do Not Sub Message							ib Message		
	Order	Confirmation	Message		Web Ban	ner	Auth	orise Email	Rules
Web Login		An Online A	ccount	-	Clear		d	Browse Sort Order	
CC Emails		support@bl	ueskysoft.co.uk						
Datacash Client No.									
Datacash Password					-11				
Protx Vende	or Name								•
Web Trader									
Web Address					Add	Clear			
Internal We	b Address								
Upload F	iles								HTML Editor

Place your internal IP address in the 'Internal Web Address' section and then fill in the 'Web Address' with either your external IP address or domain name.

